



AI Automation Agency Selection Checklist

A practical checklist for choosing the right partner — condensed from the buyer's guide, *How to choose an AI automation agency*. Tick each box before you commit.

1 Before you start

- Name the first workflow to automate
- Record a baseline (time, cost or errors today)
- Name an internal owner
- Define one clear success metric
- Set a realistic budget
- Confirm key tools have APIs or exports

2 Evaluate the agency

- Relevant experience with work like yours
- References you can call
- They ask about your process before pitching
- Case studies with real numbers and named clients
- A clear, repeatable delivery process
- They run automations in their own business

3 Ownership & security

- You own the code and workflows (IP assignment)
- It runs on your accounts, not theirs
- Least-privilege access and encryption
- You own your data, with export rights
- A signed data processing agreement (DPA)
- Business-tier AI that won't train on your data

4 Commercials & contract

- You understand the pricing model
- An SLA with response times, in writing
- Clear exit and handover terms
- You know the full first-year cost
- Payment tied to milestones, not all upfront

5 Run & scale

- Start with a small, paid pilot
- Measure ROI against the baseline
- Scale one workflow at a time
- Run a kickoff and agree a cadence
- Plan for adoption — train and build trust

▶ Red flags — walk away if...

- They won't let you own the build
- No case studies or references
- They guarantee huge, fixed results
- Vague on price, scope or exit

Ask on the first call

- How would you approach this one workflow?
- Who owns the code and the data?
- What's the full first-year cost?
- What happens if we decide to leave?

FIND YOUR SHORTLIST

Browse the AI Automation DB directory

Filter agencies by service, industry, platform and location — free to search.

www.iautomationdb.com

